



European Technology and Innovation Platform

Data Management Plan

Deliverable 1.2

WP1

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ABBREVIATIONS

RHC ETIP: European Technology and Innovation Platform on Renewable Heating and Cooling

PARTNERS

AEBIOM: Association Européenne pour la Biomasse (Bioenergy Europe)

EUREC: the Association of European Renewable Energy Research Centres

EGEC: European Energy Council

EHP: Euroheat &Power

SHE: SolarHeatEurope

EHPA: European Heat Pump Association



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1. DATA SUMMARY

The type of data generated by the project will mainly be expert reports, policy messages, and statistics, whose objectives is to increase the knowledge on the functioning of the RHC sector at EU level. For this reason, the RHC-ETIP is committed to an open access policy, where all relevant documents will be accessible via the website of the RHC-ETIP, as well as of the partner associations, and of other stakeholders willing to distribute the documents.

All expert documents, once approved by the RHC-ETIP Board, will be made available to the wider public, via the RHC-ETIP website: www.rhc-platform.org

1.1. Expert documents

The following expert documents will be produced by the project:

- Deliverable 2.2- First set of RHC-expert information material
- Deliverable 2.3- Update of RHC-expert information material
- Deliverable 2.4- Final RHC-experts information material

These documents are going to be produced by the experts selected to be part of the Horizontal Working Groups launched in January 2019. The meetings and reports of the meetings of these HWGs will be confidential, and only made available to the members of the RHC-ETIP. However, the final documents produced by the Horizontal Working Groups will be made public. Relevant references, expert knowledge and scientific sources to produce these documents will be acknowledge in the documents.

Other documents, which detail the final strategy of the RHC-ETIP, are going to be made publicly available, once approved by the European Commission:

- Deliverable 3.5 “Final strategy for engagement”. Final document which takes stock of the results achieved by the implementation of the activities detailed in D3.4- report on the set-up of the stakeholders’ group, and defines the final actions to be adopted to ensure that the additional stakeholders are fully included in the work of RHC-ETIP, after the project’s end. This Deliverable does not include confidential data, but rather a series of actions to be implemented. This document is going to be produced by the project consortium, which will ensure that the used data are not confidential.
- Deliverable 4.1 “First timeline of research policy inputs”. This document focuses on the mapping of relevant policy and regulatory issues, with the aim to creating a list of policy and regulatory issues that identifies those topics which can be of general interest to the heating

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and cooling sector. This list will be annually updated in order to take into account new developments. These documents are going to be made publicly available, since they do not contain any confidential or sensitive information. This document will be produced by the RHC-RD&I Policy Working Group, which will ensure that the used data are not confidential.

- Deliverable 4.2 “Inventory of funding instruments” is the first set of factsheets that include information on the available funding for R&D in terms of accessibility and amount. This document is going to be made publicly available. This document will be produced by the RHC-RD&I Policy Working Group, which will ensure that the used data are not confidential.
- Deliverable 4.3 “Update timeline of research policy inputs”. This document will be produced by the RHC-RD&I Policy Working Group, which will ensure that the used data are not confidential.
- Deliverable 4.4 “Final report on research policy achievements and next steps”. This document will be produced by the RHC-RD&I Policy Working Group, which will ensure that the used data are not confidential.
- Deliverable 4.5 “Final document on the financing strategy of the RHC-sector”. This document will be produced by the RHC-RD&I Policy Working Group, which will ensure that the used data are not confidential.

1.2. Meeting reports

The following meeting reports will be confidential, and made available only to the members of RHC-ETIP:

- Deliverable 1.1- Minutes of the project’s kick-off meeting on 7th December 2018. Once approved by the European Commission, this document will be available in the intranet of the RHC-website
- Deliverable 1.3- Report on the first-year activities. Once approved by the European Commission, this document will be available in the intranet of the RHC-website
- Deliverable 1.4- Report on the second-year activities. Once approved by the European Commission, this document will be available in the intranet of the RHC-website
- Deliverable 2.1- Report on the kick-off meeting of the HWGs. Once approved by the European Commission, this document will be available in the intranet of the RHC-website
- Deliverable 2.5- Report on the final meeting of the HWGs. Once approved by the European Commission, this document will be available in the intranet of the RHC-website
- Deliverable 3.1- Report on the kick-off meeting of the Technology Panels. Once approved by the European Commission, this document will be available in the intranet of the RHC-website

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These documents will be produced by the secretariat of the RHC-ETIP.

1.3. Contact database of relevant stakeholders

Deliverable 3.2 is a confidential document, since it contains confidential information related to data collection related to experts. For more information related to the treatment of these data, refer to Paragraph **Error! Reference source not found.**

Deliverable 3.4 “Report on the set-up of the stakeholders’ group” is also a confidential document, since it details the number and type of stakeholders who have agreed to be part of the RHC-ETIP stakeholders’ group, and the degree of their involvement (active participation in meetings/calls/webinars/annual conference/national roundtables), active feedback to consultations, active promotion of the RHC-ETIP at their event, and via their communication tools (e.g. social media). For more information related to the treatment of these data, refer to Paragraph **Error! Reference source not found.**

1.4. Online projects’ database

As part of the SecRHC-ETIP contract, the project’s partners will also set up an online database, embedded in the website. As a first step, the information included in this online database will be taken from the projects which have been analysed by the project’s partners as part of the tender PP2041-2014 to support the activities of the European technology Platform on renewable Heating and Cooling. Only non-confidential information will be included. If necessary, this will be previously checked with the projects’ coordinators.

The database will collect projects according to these categories:

- Project title
- Acronym
- Countries involved
- Developed solutions
- Main technologies
- Pictures
- Funding programme
- Overall budget
- Main results
- Link to website (or relevant contact)

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The first version of the projects' database will be ready for May 2019. The project's partners, led by EHPA, will continue populating the database, by contacting project's coordinators and ensuring that their projects is listed on the RHC-website. The final version will be available by the end of the project.

2. FAIR data

2.1. Making data findable, including provisions for metadata

The RHC-members' database will be automatically created when the RHC-members register online (www.rhc-platform.org) via the "Become a member" form. Since a website and a members' database have been in place since 2011, once the new website is online, the RHC-members, who are registered in the current database, will be contacted in order to update their information, and accept that the data that they make available is used to send them relevant information related to the work of the RHC-ETIP.

EUREC, which is in charge of communication activities, as well as being the project's scientific coordinator, has direct access to this database, and its information, and will be able to export it in order to share some parts with the other project's partners in charge of the different activities (e.g. technology Panels and Horizontal Working Groups).

Clear versions will be made available whenever requested, by using the month where such a version is requested.

Excel documents with the contact information of the members obtained when exporting the data from the members' database. A mailing list related to the RHC ETIP platform, the data collection is done via a Mailchimp form embedded on the website. The Mailchimp list can be exported as an Excel document. Each Mailchimp campaign gives the possibility to change the subscriber preferences or to unsubscribe from the list.

2.2. Making data openly accessible

The type of data generated by the project will mainly be expert reports, policy messages, and statistics, whose objectives is to increase the knowledge on the functioning of the RHC sector at EU level. For this reason, the RHC-ETIP is committed to an open access policy, where all relevant documents will be accessible via the website of the RHC-ETIP, as well as of the partner associations, and of other stakeholders willing to distribute the documents.

All expert documents, once approved by the RHC-ETIP Board, will be made available to the wider public, via the RHC-ETIP website: www.rhc-platform.org.

The Deliverables, which are open to the public, are clearly indicated in the Contract Agreement.

Those Deliverables which cannot be made public include:

- Internal reports of activities of the RHC-ETIP, which are only shared with the RHC-Board (Deliverables 1.3 and 1.4)
- Consortium Agreement (Deliverable 1.5), since it is an internal document to be agreed by the project's partners
- Minutes of secretariat meetings, Board meetings, technology Panels and HWGs' meetings will only be shared with members of RHC-ETIP. They will, therefore, be made available in the protected area of the RHC-website.
- Contact database of relevant stakeholders will only be made available to the project's

2.3. Making data interoperable

The data produced in the project are interoperable, since they adhere to standards for formats (normally, they are available in Excel and/or Word).

2.4. Increase data re-use (through clarifying licences)

Data, which are publicly available, can be re-used if the source is clearly quoted. This will be indicated in all open access documents.

3. Allocation of resources

Since all public data are generally made available to potential users, there are no costs envisaged in the project for making the data FAIR. We consider that they are generally FAIR.

EUREC will be in charge of the Data Management in the project. More specifically, Paola Mazzucchelli, the project's scientific coordinator, will be in charge of this. This will be clearly indicated in the webpage.

4. Data security

A back-up of the data stored on the website will be ensured by the website developer (Cherry Pulp).

5. Ethical aspects

Ethical issues in the SecRHC-ETIP's project are mainly related to the collection and treatment of personal data.

Informed consent for data sharing and long-term preservation is included in questionnaires dealing with personal data (including registration to conferences and events for those people who are not already included in the RHC-members' database, or in the RHC-stakeholders' database).

5.1. Members of RHC-ETIP

The SecRHC-ETIP project involves collecting and processing personal data from individuals participating to the activities of the Platform, who, first of all, ask to become member via the RHC-website.

When applying to become member or stakeholder of the RHC-ETIP, the following boxes should be made mandatory to tick in the membership form:

[1] I agree to my details being used for the purposes of the RHC-ETIP project and to receive regular news and updates on the activities of the RHC-ETIP and on related events. I understand my data will be held securely and will not be distributed to third parties. I have a right to change or access my information.

[2] I accept the RHC-ETIP terms and conditions

The project will have a consortium agreement signed among the project partners to manage (amongst other things) the ownership and access to key knowledge (IPR, da-ta etc.), and the terms and conditions on data collection and use.

Moreover, the RHC-ETIP has also developed terms and conditions, presented in the RHC-website as the updated Disclaimer & Fair notice May 2018 (GDPR) (<http://www.rhc-platform.org/imprint/>).

The data collected from those who ask to become member of the RHC-ETIP will be stored in a database on the RHC-website, only accessible by EUREC. However, the other project partners will have access to the data that they need to carry out the activities they are responsible for. Namely:

- Bioenergy Europe: Biomass Technology Panel, and HWG on 100% RE Buildings.
- EGEC: Geothermal Technology Panel, and HWG on 100% RE Cities.
- EHP: District Heating and Cooling and Thermal Energy Storage Technology Panel, and 100% RE Districts.
- EHPA: Heat Pump Technology Panel.
- SolarHeatEurope: Solar Thermal Technology Panel, and 100% RE Industries.

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The collected data is the following one:

- Title
- Last and first name of the member- compulsory
- Organisation- compulsory
- Position in the organisation
- Country where the organisation is established- compulsory
- Address of the organisation
- Website of the organisation
- Email of the person applying for membership- compulsory
- Telephone of the person applying for membership
- Organisation type (whether it is a SME or not)
- Of which Technology Panel(s) the member wants to be part- compulsory
- Description of the member's activities which are in line with the scope and mission of RHC-ETIP- compulsory

The aim of the collected information, especially the compulsory one, is to make sure that people who become members of the RHC-ETIP are working in relevant fields, and can bring their knowledge and expertise to the work of the RHC-ETIP, even when they are not actively involved in its activities. Limited statistics can also be produced by the secretariat of the RHC-ETIP on the basis of the collected data (e.g. country distribution of the RHC-members; share of industry/SMEs involved in the work of RHC-ETIP...).

The collected data are used to inform the members of the RHC-ETIP about relevant activities carried out by the RHC-ETIP, such as:

- Calls for experts and other official communications (e.g. elections). For example, recently, the RHC-ETIP launched a call for expressions of interest to become an expert in its Horizontal Working Groups. In this case, additional information, such as a short motivation, can also be requested. The collected information is, in such a case, made also available to the Selection Committee which is set up to evaluate the applications, and select the candidates. The composition of such a Committee, as well as the selection procedure, is detailed in the relevant emails and dedicated webpage.
- Invitation to RHC-events. In this case, an email is circulated to all members of the RHC-ETIP.
- Newsletter: one of the conditions to be a member of RHC-ETIP is to receive the official communications from the platform. By default, all new members are sub-scribed to the

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newsletter, but they can unsubscribe via any RHC-ETIP Mailchimp campaign (following the footer link 'unsubscribe') or, by sending an email to in-fo@rhc-platform.org. Apart of this, there is the RHC ETIP newsletter form, available on the website, to collect the email address from all the website visitors interested in receiving the RHC-ETIP newsletter.

Participation to some RHC-events (e.g. its Annual conference) is, however, open to several stakeholders, not only those who are members of the RHC-ETIP.

5.2. Stakeholders of the RHC-ETIP

As part of Work Package 3 "Members' and stakeholders' engagement", the partners SolarHeatEurope and EHP will prepare a Contact database of relevant stakeholders (Deliverable 3.2), whose first version is expected at Month 3 (end of February 2019).

The database will mainly be composed of two parts:

- Data related to national and local government representatives. Since government representatives will be contacted in their official role, all contact details which are publicly disclosed will be added to the database. In a second stage, they will be contacted by the project partners in order to check their willingness to be involved in a more pro-active way in the work of the RHC-ETIP. For those representatives whose data are not publicly accessible, they will be contacted by the relevant organisation in order to ask for their consent to be included in the database. The second stage will span between March and June 2019, since the first draft of the RHC-stakeholders' engagement strategy is foreseen for July 2019. The collected data is the following one:
 - Title
 - Last and first name of the member- compulsory
 - Organisation- compulsory
 - Position in the organisation
 - Country where the organisation is established- compulsory
 - Address of the organisation
 - Website of the organisation
 - Email of the person applying for membership- compulsory
 - Telephone of the person applying for membership
 - RHC-technologies of interest- compulsory (more than one choice is possible):
 - Biomass

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- District Heating and Cooling
- Geothermal
- Heat pumps
- Solar Thermal
- Thermal Energy Storage
- RHC-Horizontal Working Group(s) of interest- compulsory (more than one choice is possible):
 - 100% RE Buildings
 - 100% RE Cities
 - 100% RE Districts
 - 100% RE Industries
- Whether they want to receive the RHC-Newsletter. This possibility is also open to other types of stakeholders who do not necessarily apply for RHC-membership, but still want to stay informed on the RHC-activities.
- Data related to other relevant stakeholders at international, national and local levels. In order to respect GDPR regulation, in the first draft, only contact details related to organisations will be included. The collected data, in the first stage, is the following one:
 - Organisation- compulsory
 - Country where the organisation is established- compulsory
 - Address of the organisation
 - Website of the organisation
 - Organisation type (whether it is a SME or not)
 - RHC-technologies of interest for the organisation (compulsory):
 - Biomass
 - District Heating and Cooling
 - Geothermal
 - Heat pumps
 - Solar Thermal
 - Thermal Energy Storage

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In a second stage, relevant representatives from the identified organisations will be contacted by the project partners in order to check their willingness to be involved in a more pro-active way in the work of the RHC-ETIP. The second stage will span between March and June 2019, since the first draft of the RHC-stakeholders' engagement strategy is foreseen for July 2019. The data collected at this stage will also contain this information:

- Title
- Last and first name of the member- compulsory
- Organisation- compulsory (already collected)
- Position in the organisation
- Country where the organisation is established- compulsory (already collected)
- Address of the organisation (already collected)
- Website of the organisation (already collected)
- Email of the contact person(s)- compulsory
- Telephone of the contact person(s)
- RHC-technologies of interest- compulsory (more than one choice is possible):
 - Biomass
 - District Heating and Cooling
 - Geothermal
 - Heat pumps
 - Solar Thermal
 - Thermal Energy Storage
- RHC-Horizontal Working Group(s) of interest- compulsory (more than one choice is possible):
 - 100% RE Buildings
 - 100% RE Cities
 - 100% RE Districts
 - 100% RE Industries
- Whether they want to receive the RHC-Newsletter. This possibility is also open to other types of stakeholders who do not necessarily apply for RHC-membership, but still want to stay informed on the RHC-activities.

HISTORY OF CHANGES

Version	Publication date	Change
1.0	01.02.2019	▪ Initial version prepared by Paola Mazzucchelli
2.0	20.02.2019	▪ Intermediary version prepared by Paola Mazzucchelli
3.0	28.02.2019	▪ Final version submitted by Paola Mazzucchelli